SP *a professional paper*

Report of the Program Committee
for the 1966 ADI Convention

Carlos A. Cuadra

December 30, 1966

SYSTEM

DEVELOPMENT

CORPORATION

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SDC

ABSTRACT

This document is a comprehensive report on the experiences of the
Program Committee for the 29th Annual Meeting of the American
Documentation Institute, held in Santa Monica, California, from
October 3-7, 1966. The report describes the program planning and
program support activities in detail; provides samples of the
materials, forms and schedules used; highlights problems and
successes; and makes a number of detailed and general recommendations
for streamlining future ADI convention planning.

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A.   Purpose of Report

This report summarizes the experiences of the Program Committee for
the 29th Annual Meeting of the American Documentation Institute, held
in Santa Monica, California, from October 3-7, 1966. It presents a
number of the materials and forms used during the planning and oper-
ation of the convention, highlights important problems that may be
faced by planners of other conventions, and makes a number of recom-
mendations for streamlining convention planning and reducing the amount
of needless effort.

B.   Scope of Report

In addition to discussing activities directly concerned with the
Technical Program, this report also covers a number of other activities
related to the overall convention context. In some conventions, these
other activities might have been handled by the General Convention
Chairman or by an Assistant Convention Chairman; in our case, they
happened to be handled by the Technical Program Chairman (henceforth
"Program Chairman").

C.   Organization of Report

This report will cover 15 major topical areas, listed below with their
sections numbered.

     2.   Developing the Convention Concept
     3.   Organizing the Progress Review Panels
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D.   Members of the Program Committee*

Members of the Program Committee were:

1. Carlos A. Cuadra, System Development Corporation--Chairman

2. Robert M. Hayes, University of California at Los Angeles--Tutorial
    Sessions

3. Tom Hohl, System Development Corporation--Audio-Visual

4. Cynthia A. Hudson, System Development Corporation--Secretary to
    Program Chairman

5. Calvin Mooers, Rockford Research--Discussion Groups

6. Richard H. Orr, Institute for Advancement of Medical Communication--
    Prize Papers Selection

7. Ann Walker, System Development Corporation--Program Design and
    Post-Convention Evaluation

8. Everett Wallace, System Development Corporation--Coordination of
    Paper Reviews

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*Other Committees for the 1966 ADI Convention have also made reports of
their activities. These reports are on file at ADI Headquarters.

2.   DEVELOPING THE CONVENTION CONCEPT

The assignment of a Program Chairman was made in October 1964, two years prior to the meeting itself. Because of his general interest in convention organization and his prior formal evaluation of the 1963 ADI convention in Chicago, the Program Chairman was also asked to take the responsibility for outlining the overall convention concept.

Following a very brief and informal "post mortem" that took place at the 1964 convention in Philadelphia, the Program Chairman initiated a formal evaluation of that convention. Questionnaires were mailed out in October 1964, and after analysis of the returns, a report was prepared and distributed in January 1965. It was later published in American Documentation (Comments on the 1964 ADI Meeting, April 1965, Vol. 16, No. 2).

The report commented on both the reported virtues and weaknesses of the 1964 convention. Attendees gave very favorable comments about the idea of Author Forums and other informal discussion-type events but also had some criticisms on scheduling and adherence to the schedule. Probably the most important of the reported weaknesses was in the "quality" of the technical presentations, which many respondents felt was below what ADI should strive for.

On the basis of this feedback, together with results from the survey of the 1963 ADI convention, the Program Chairman set as the primary goal to achieve the highest level of technical quality possible in the 1966 convention.

Analysis of previous convention rosters showed that there are many more ADI members on the Eastern seaboard than in the West and that ADI conventions away from major Eastern or Midwestern population centers might not be well attended. This fact led to the setting of a second major goal: In addition to insuring overall technical quality, it was essential to provide the kind of program that would attract many different kinds of interested people. A third goal, closely related to the second, was to make the idea of a West coast trip as attractive as possible, to counteract the predicted negative effect of a long trip, extra cost, extra time, etc.

The last of these goals was actually tackled first. A request was made to System Development Corporation that it attempt to set a firm date for its annual "night" at Disneyland two years in advance. Although the date is usually set only about two months in advance, both organizations were very cooperative, and the date was given and guaranteed. The convention was therefore scheduled to end on Disneyland night, Friday, October 7, 1966.

The goal of upgrading technical quality was addressed in a number of ways, which can be reduced to the following:

1.   Trying to insure that very good people were invited to participate in the program.

2.   Trying to insure that the people who participate would do the most "homework" we can possibly get them to do.

3.   Trying to get the audience to do as much homework as possible and to feel some responsibility for contributing to a higher level of technical discussion.

4.   Trying to insure that all potentially high-quality contributions could be accommodated on the program, regardless of special content area.

Two primary means of meeting some of these goals were selected by December 1964. The first was to take advantage of the likelihood that there would be in existence a program to develop an "Annual Review of Information Science and Technology." This would of necessity provide a dozen or more chapter authors who had done an exceedingly large amount of study on a particular topic. If their documented analysis could be made available in advance to other specialists, and if it could be made the focus of discussion, the technical quality of the discussions could be greatly enhanced. NSF-SDC support of the Annual Review was assured early in 1965, and the publication schedule was set to make the Annual Review available no later than the opening date of the convention.*

The use of the Annual Review analyses as the focus of discussion had the advantage of permitting use of a "progress" theme, which would not restrict the range of content planned for the convention. The ability to accept all high-quality reports and presentations, regardless of specific content area, would obviously be a help in upgrading technical quality of the 1966 program as a whole.

The second primary means for meeting some of these goals was to have a program of tutorial sessions, frankly advertised as such, to permit students, newcomers, and those in need of a "brushup" to learn enough to participate more intelligently in author forums, discussion groups and other planned events. It was assumed that there is nothing more demoralizing to an author

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*It was fortunate that the Program Chairman was also the Editor of the Annual Review series, since this eliminated a host of planning and coordination problems that would probably have defeated the idea of integrating the convention and the Annual Review.

forum or discussion group than a series of irrelevant or poorly conceived questions and comments. The tutorials were conceived of as a means to help everyone participate in all the other program sessions in a more perceptive and productive way.

The second goal, that of having a strong appeal to a heterogeneous audience, was attacked by an analysis of types of convention participants and attendance motives. Six types of participants were identified:

1. ADI "old timers"

2. Information system designers and operators

3. Students and newcomers to the field

4. Researchers in information science

5. Manufacturers and salesmen

6. Non-ADI VIP's

For each of these classes, the presumed value of their attendance, to them and to the convention, was considered, and a preliminary list of ideas for attracting their participation was developed. For example, researchers provide "leading edge" information to the convention. To attract them, one must not only provide an opportunity for them to give a research paper but also provide the opportunity and context for meetings with fellow researchers. Students, on the other hand, probably ask themselves, "Will I be able to understand what is going on?" and it seemed necessary to provide a program element (the tutorials) that would reassure them that participation would be rewarding.

The particular conclusions reached in this analysis are probably less important than the fact that the analysis was done. Performing this kind of exercise is one way to insure that the program chairman takes into account the need for a variety of program elements and points of attraction. It is a highly recommended exercise for all future convention planners.

On the basis of this preliminary planning, which began in October 1964, a memorandum on the overall plan (see Figure 1) was drawn up for concurrence by the General Chairman, in March 1965. While several major and scores of minor changes subsequently took place in the schedule, the basic convention concept described in the memorandum survived intact through the convention.

TO: H. Borko

FROM: C. A. Cuadra

SUBJECT: Preliminary Plans for the 1966 ADI Meeting

The following is a summary of my preliminary thinking about the format for
the 1966 ADI meeting in Los Angeles. Some aspects have been thought through
more carefully than others, and all of the information presented below is
recorded primarily for your information, rather than for formal concurrence.

Theme

The theme of the meeting will be "Progress in Information Science and
Technology." The theme is intended to emphasize the fact that we will be
taking stock of our work in the long interval since the 1964 convention.
The theme is also intended to be non-restrictive. That is, it will permit
us to accept high-quality reports and presentations, regardless of whether
they fit some predetermined theme area.

Length of Meeting

The meeting proper will be four full days, Tuesday through Friday, October
4-7, 1966. There will be a half-day session prior to the convention which
will be devoted entirely to tutorial sessions. The Los Angeles Chapter may
be asked to take an active role in this activity.

Basic Technical Program

Five of the eight major time blocks (full morning or afternoon) will be
devoted largely to the progress reviews. In each such session one or more
content areas corresponding to chapters in the Annual Review will be reviewed
in panel fashion. The author of the chapter covering 1965 literature will
give a 30-40 minute presentation, to be followed by panel discussion for
somewhat under 60 minutes. The panel will include the designated author
of the succeeding year's review and one, or perhaps two, other experts.

Some progress review sessions--those of lesser or special interest--may be
scheduled to run concurrently, in order to leave major time blocks for
other important technical events.

The other two major technical events will be the author forums and discussion
groups. The author forums will be similar to those which have been conducted
for the past two ADI conventions, but with two changes. First, sessions
will be scheduled within six to ten topic groups. Within each group, there
will be no scheduling conflicts. Secondly, authors will be uniformly asked
to give a ten to fifteen minute presentation (summary) at the beginning of
their Forum to permit wider audience understanding and participation. This
arrangement will combine the best features of a paper session with those of
the unstructured author forums.

Figure 1.   Preliminary Plans for 1966 ADI Meeting (Sheet one)

The discussion groups will combine the previous activities variously called "Discussion Seminars," "Specialized Discussion Seminars," and "User's Exchange." Notes in the program will indicate the scope and intent of each group.

Other Technical Events

The ADI business meeting will be restructured so as to constitute an informative and entertaining report. It will be called "The ADI Reports" and will have presentations of those committee reports of more than passing interest. No other convention event will be scheduled concurrently.

Tours will all be scheduled for one afternoon, with no conflicting program event. Those who choose not to go on tours may visit the exhibits, meet with their colleagues, do the necessary reading for Author Forums, or go to the beach.

The exhibitors will have a full afternoon for presentations, with no conflicting program event. Those who are not interested may engage in the alternate activities outlined above.

Other Events

As you know, preliminary arrangements have been made for convention attendees and their families to join with SDC personnel in attending SDC's annual Disneyland Night, Friday, October 7. The entire Disneyland area is taken over on this one night, offering little or no waiting in lines. The cost for tickets has always been under $4.00 per person.

Future Plans

The key to a successful convention is the quality of the technical presentations. In the next several months I expect to devote considerable attention to mechanisms for bringing about the desirable level of quality. I have deliberately withheld effort in this area pending the receipt of the report on the experience from the last convention. Since it has now been some five months since that meeting, I suggest that you determine as soon as possible whether any report is really forthcoming.

<div style="text-align: right">

Carlos A. Cuadra
March, 1965

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Figure 1. Preliminary Plans for 1966 ADI Meeting (Sheet two)

PRELIMINARY ROOM SCHEDULE FOR

1966 ADI MEETING: "PROGRESS IN INFORMATION SCIENCE AND TECHNOLOGY"

Monday	Tuesday	Wednesday	Thursday	Friday
Miscellaneous ADI Business	(Plenary Session) Welcome Convention Plan Review Review	(Semi-Plenary Sessions) • 4 Reviews • Invited Address	(Semi-Plenary Sessions) • 4 Reviews	(Semi-Plenary Sessions) • 4 Reviews • Invited Address
		LUNCHEON		
Tutorial	Tours (Open)	Author Forums	Exhib. Pres. (Open)	(Plenary Session) • Review
Recreation	Recreation	Recreation	Recreation	Closing Remarks
Tutorial	Discussion Groups	Discussion Groups	"The ADI Reports"	Disneyland

C. A. Cuadra

Figure 1.   Preliminary Plans for 1966 ADI Meeting (Sheet three)

3.   ORGANIZING THE PROGRESS REVIEW PANELS

The general concept for the Progress Review Panels, announced in the
memorandum of March 1965, was described to all the prospective authors of
Annual Review chapters, beginning in May 1965:

> Authors of the first two volumes of the 'reviews' will be
> invited to play a significant role in the 1966 ADI meeting, to
> be held in Los Angeles in early October. The theme for that
> meeting will be 'Progress in Information Science and Technology,'
> and the technical program will be built around a dozen panels,
> each representing a major area of interest. While the technical
> program is not yet developed in detail, it seems desirable that
> each panel should have as a leadoff speaker the author(s) of the
> corresponding chapter in Volume I, with the designated author(s)
> of the next year's Review as one of the several discussants.
> This arrangement will provide an opportunity for the 'review'
> authors to make very effective use of their work on the
> 'review'.*

In October 1965, a meeting of Annual Review authors was held at the FID
meeting in Washington. At that time, the role of the authors in the Progress
Review Panels was discussed. Some of the authors had forgotten--or not
noticed--the paragraph given above, and a few felt that participation on the
program might be an added burden (which, of course, it was). However, all
agreed to participate.

No significant further action was undertaken until February 1966, when the
participation of each Annual Review author was specifically confirmed. Each
author was also asked for suggestions on fellow panelists, and these names
were added to a developing list of candidates for each panel. During the
following month, the Program Chairman met with the General Chairman and other
committee members to make the final selection. The following were the major
guidelines used.

1.   Seek people who are known to be very competent technically.

2.   Seek people who are likely to take the job of preparation seriously
      and work hard.

3.   Other things being equal, seek people who are likely to attract
      favorable interest and attention to the panels.

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*Summary Information on the Annual Review of Information Science and
Technology, May 1965.

4. Seek people who, in addition to having technical competence, are thoughtful and understandable speakers.

5. Avoid people who tend to have the same "message" from convention to convention, irrespective of the task or topic at hand.

6. Avoid people who are likely to talk about their current work (interesting as it may be) instead of the intended task of reviewing progress generally.

7. Put at least one person on each panel who is not afraid to make a few provocative or critical statements. (Correspondingly, avoid just using people nominated by the chapter author nominees, since they might have some "sameness" of view.)

8. Other things being equal, use people from the Western part of the U.S., since they are not as likely to be overexposed (to Easterners).

9. Within each content area, choose the strongest technical people as panelists and the strongest managers, administrators or "prestige" figures as chairman.

Using these guidelines, a set of panel chairmen, alternative panel chairmen, and panelists was decided upon for each panel. Invitations (See Figure 2) were sent to prospective chairmen, starting in March 1966, and continuing through May. Whenever an invitation was declined, a letter was immediately sent out to an alternate. One or two panels required several letters. In all, 21 invitations were required to obtain the necessary 12 Chairmen.*

As each acceptance was received it was immediately acknowledged, and the invitee was told that he would receive further instructions later. Beginning in April, detailed instructions were sent to the Panel Chairmen. They were also given a suggested list of panelists and a sample letter of invitation to panelists. In spite of the fact that the program plan required a high degree of organization, it was recognized that some Panel Chairmen might not relish having either a ready-made panel or what might appear to be a purely figurehead role. Therefore, the instructions to the Chairmen (See Figure 3) made it clear that they had considerable latitude in the organization of their panel. While the Annual Review chapter authors were, of course, mandatory participants, others whose names were mentioned to the chairmen were only suggested participants. (Some chairmen used all and only the suggested participants; others invited different persons.)

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*Later after the final program had gone to press, government travel restrictions forced the withdrawal of one panel chairman.

RESEARCH AND TECHNOLOGY DIVISION 2500 Colorado Avenue, Santa Monica, California 90406

SDC   SYSTEM DEVELOPMENT CORPORATION

As Technical Program Chairman of the 1966 ADI Convention, I am
taking this opportunity to send you a copy of the preliminary
program and to invite you to contribute to the program as
Chairman of the Progress Review Session on

The Progress Review Sessions are built around ADI's forthcoming
"Annual Review of Information Science & Technology," the first
volume of which will be published in October. Each Progress
Review Session will be devoted to a particular subject area
covered by one of the chapters, and the leadoff presentation
for each Session will be the author's summary of highlights in
his area.

The role of the panelists is to contribute to an interesting
discussion, based on their own independent perspective and
appraisal of progress. Your role as Chairman would be to
establish the format of the discussion with the panelists, to
introduce the session and the panelists, and thereafter to
keep the discussion moving in a productive manner. Some Session
Chairmen may wish to make a closing summary or even to enter
actively in the discussion. This, however, is entirely
optional.

In addition to learning whether you can accept the Chairmanship
of this session, I would appreciate knowing whether you plan to
submit a paper for the meeting. We are hoping not to have
participation in a panel preclude acceptance of a paper, but
we are trying to permit a maximum number of members to
participate in the meeting and the number of papers that can
be accepted will be very limited this year.

Figure 2. Invitations to Panel Chairmen (Sheet one)

Would it be at all possible to have your response on or before
April 11? This would enable us to identify you as Chairman
to the panelists, when we issue letters of invitation to them
later in April.

We hope that you will be able to participate. If there is any
additional information you require, please do not hesitate to
call on me. I can be reached at the SDC address above or by
telephone: Santa Monica, California; EXbrook 3-9411;
extension 6519.

                                        Sincerely,

                                        Carlos A. Cuadra
                                        Technical Program Chairman
                                         1966 ADI Meeting

CAC:ch
Enclosure

        Figure 2. Invitations to Panel Chairmen (Sheet two)

Dear

Now that we have received acceptances from all of the invited panel
chairmen, I would like to provide you with additional information and
suggestions on your Progress Review Panel.

First of all, the panel on

is scheduled for 90 minutes on
In addition to yourself, the panel should include the author of the
corresponding Annual Review chapter,
and about three other discussants.

Over the past year and a half, while considering candidates for our
Annual Review chapters, I have collected for each chapter a list of
people recommended for this role by their fellow professionals, in-
cluding our current chapter authors. I have thought it useful to provide
you with the names of several persons (see attachment) who, I believe,
could contribute worthy and complementary or contrasting points of view
to your panel. In each case, the list includes one person who has been
or is about to be invited to review the 1966 literature for our next
Annual Review. None of the persons on the list is scheduled for
another panel, and none has submitted a paper. Therefore, if you are
interested in asking them to join your panel, I know of no present
conflict with other convention activities.

As a further aid, I am enclosing a form letter which you may wish to
modify and use as your letter of invitation to panelists. The
modifications would probably have to do with the particular way in
which you choose to organize the panel. You will, of course, be able
to count on a leadoff presentation by the Annual Review chapter

Figure 3. Instructions to Panel Chairmen (Sheet one)

author. Since the work for the chapter concentrated on progress in
1965, and since your panelists will be given advance copies of the
chapter, I think it might be reasonable to ask them to take the
primary responsibility for highlighting more recent (1966) work and
for contributing their independent appraisals of elements of progress,
regardless of time period.

I have somewhat of a personal aversion to panels in which only a series
of prepared and unrelated papers are presented, with little or no
interaction among the panelists. One way of avoiding this, which I
tried with some success in the 1964 ADI convention, was to construct a
list of provocative questions and have one pair of panelists be prepared
to join in a discussion on each of the questions. Perhaps this device
may be of use to you.

The suggested schedule of activities from this point on is as follows:

1. Make some preliminary decisions about how you would
    like to organize the discussion.

2. Telephone the principal reviewer for your panel to
    obtain general concurrence about his or her role in
    the panel.

3. Extend the invitations to the other panelists, either
    by mail or telephone. Please be sure to obtain the
    correct affiliation, as it should appear in the program.

4. Send me the names and affiliations of the panelists as
    soon as all of the acceptances are in.

I will need item (4) before July 1, to meet our program printing schedule.
If you can arrange to have it even earlier, this would be immensely
helpful. You will, of course, have time between June and October to
arrange the details of the panel and to collect whatever biographical
information you may wish for your introductions.

If you have any questions about any of this, please do not hesitate
to call on me. My telephone number in Santa Monica is EXbrook 3-9411.

<div style="text-align:center">Sincerely,</div>

Carlos A. Cuadra
Technical Program Chairman
   1966 ADI Meeting

CAC:ch
Enclosure

<div style="text-align:center">Figure 3. Instructions to Panel Chairmen (Sheet two)</div>

SAMPLE INVITATION TO PANELISTS

1966 ADI Meeting

Dear

As Chairman of the Progress Review Panel on "   "
at the 1966 ADI Convention, I would like to invite you to serve as a
discussant on this panel, which is scheduled to run for 90 minutes
on

The Progress Review Panels are built around ADI's forthcoming "Annual
Review of Information Science and Technology," the first volume of
which will be published in October. Each Progress Review Panel will
be devoted to a particular subject area covered by one of the chapters,
and the leadoff presentation for ich Panel will be the author's
summary of highlights in 1965.

Your role as a panelist would be to contribute to an interesting
discussion, based on your own perspective and appraisal of progress.
Since the chapter author has concentrated primarily on 1965, I would
hope that you would agree to focus on more recent (1966) work, as well
as contributing your views on elements of progress, regardless of time
period. I should not expect you to prepare, and would indeed enjoin you
from presenting, anything like a formal paper on this topic.
Nor would we want you to act primarily as a commentator upon the
author's work. Rather we need your mature perspective and expertise
to highlight and amplify important issues in this subject area that
are necessarily treated briefly and selectively in a comprehensive
review. You should feel free to comment, to express your own point
of view, and in other ways to address and interact with other panelists
to the end that the participants and audience emerge from the session
feeling that they had been given a competent and comprehensive
assessment of the current state of progress.

If you agree to participate, I shall make arrangements to provide
you with advance page proofs of the Annual Review chapter so that you
will be familiar with its coverage and emphases. I would appreciate
your reply at your earliest convenience. If you can participate, please
indicate, also, your correct affiliation, as it should appear in the
program.

Figure 3. Instructions to Panel Chairmen (Sheet three)

ATTACHMENT I.

PRINCIPAL REVIEWER:

OTHER CANDIDATES FOR PANEL   COMMENTS
_____   _____

Figure 3.   Instructions to Panel Chairmen (Sheet Four)

The reasons for providing a simple letter of invitation to panelists were (1) to make it easier for the panel chairmen to proceed with their invitations quickly, and (2) to insure that panelists would understand the concept of the progress review sessions, (particularly not second-guessing the chapter authors). It was feared that something might be "lost in the translation" if the pa 1 chairmen each wrote letters from scratch. As it turned out, some chairmen and some panelists misunderstood the rationale anyhow. However, without the uniform instructions, the deviations from plan would undoubtedly have been more frequent and more severe.

The chairmen began inviting panelists in April 1966, and made the final inputs of names and affiliations in July 1966, just as the final program was going to press. Some chairmen did particularly good jobs of organizing their panel's activities, as witness the correspondence in Figure 4.

Organizing the Progress Review panels was a very difficult but probably worthwhile effort. The requirement to use a chapter author as the principal reviewer and author of the next volume of the review as a panelist imposed some severe burdens, because some of the Volume II authors were not decided upon until after the program went to the printer. However, eleven out of the twelve panel- had the Volume I author available as the principal reviewer, and six out of the twelve panels had the Volume II author available as a panelist.

NATIONAL ACADEMY OF SCIENCES • NATIONAL ACADEMY OF ENGINEERING

2101 CONSTITUTION AVENUE, N.W., WASHINGTON, D. C. 20418

COMMITTEE
ON SCIENTIFIC AND
TECHNICAL COMMUNICATION   July 19, 1966

TO: ·   Dr. Launor F. Carter, Systems Development Corporation
            Dr. Donald Hammer, Purdue University Library
            Dr. Carl Overhage, INTREX, Massachusetts Institute of Technology
            Dr. John Sherrod, U. S. Atomic Energy Commission

Dear Members, Progress Review Panel on National
            Information Issues and Trends:

        --for as such I hope you all recognize yourself, either ex
officio--as in the case of our principal reviewers, present and future--
or because of your much appreciated acceptance of my invitation to serve.

        Our session in Santa Monica on 6 October is scheduled for 90
minutes. If we each allow ourselves an equitable share for our initial
statement with a little bit extra for our principal reviewer, it comes
down to 20 minutes for John Sherrod, 10 minutes each for the rest of us,
and 30 minutes for discussion.

        As we get underway, I shall have to introduce you. Could I,
therefore, ask you for the favor of sending me at your convenience a
short biographical sketch, such as your secretary may have in her desk
for exactly such occasions?

        We should also be concerned with our personal logistics well in
advance of the meeting: By copy of this letter, I am therefore asking
Dr. Cuadra to make sure that each of us gets the appropriate registration
and reservation forms. I, for one, am reasonably sure that I have not
yet seen or completed such forms.

        And now let me turn to discuss in general terms how I should like
to suggest that we approach the task which has been set for us. Asked to
review the scene on the national level, we presumably should render ac-
count of the principal items of progress during the current year along
the following three main lines of national endeavor:

        (1)   Advances in structure and netting of national systems
              (centers, links, hierarchies, etc.)

        (2)   Identification, perhaps resolution of policy issues in
              information management (cost/benefit consideration,
              economics and support, overlapping services, etc.)

Figure 4. Example of Organizing Panel Activities (Sheet one)

Drs. Carter, Hammer, Overhage, Sherrod
July 19, 1966
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      (3)   Understanding the patterns of producer and user behavior
           (individuals, groups, societies, informal versus formal
           modes of information, etc.)

Our general objective should be, I guess, to have the panel's session touch
as nearly as possible on everything which Dr. Hammer ought to consider for
working into his write-up of next year's Annual Review chapter. In other
words, between the prepared statements and the discussions which they pre-
cipitate a fair measure of sighting and sorting the material for the
Annual Review chapter should get done--and, what is more, with guidance
and assistance from the ADI membership.

      In order to get that kind of coverage, I think that each of us
should feel free to include in his introductory statement any important
item about which he has knowledge or ideas--no matter under which of the
three main headings it may fit--just so long as we can preserve something
like this general grouping throughout. In second approximation we might
then look for eventual redundancies that can be eliminated.

      At the same time, there are certain aspects of the business to
which one of us has been closer than any of the others. Let us agree to
make this the basis of some coordination. There is, first of all, our
Principal Reviewer, John Sherrod, whose chapter for the 1965 Annual
Review has concentrated particularly on the activities of the Federal
Government. Using this report as a springboard--and copies of it are
being distributed to all of us--he could appropriately give primary em-
phasis in his Panel remarks to the further development during this year
of the various Government endeavors.

      On the other hand, SDC has conducted a significant fraction of
all the more ambitious information system studies. This suggests that
Launor Carter make it his major concern to appraise the role of systems
and operations analytical studies in the general area of information
services. What studies of this kind are feasible and what can only be
found out by trial and error at full scale; what studies are now required
and with what urgency; and how is all this related to the formulation of
policy?

      As for my part, a brief perspective on the Committee on
Scientific and Technical Communications of the two Academies and its
activities to date is probably all for which my allotted time will pro-
vide in addition to my start-up duties.

      Progress in thought and action on the university circuit as
regards the stewardship of information would appear to be most appropri-
ately introduced by Don Hammer who--undoubtedly--has been quite close to
the invigorating EDUCOM exercises on this front. The new alliance, in
turn, which is being formed between the world of electronics and that of
aids to education--the lines along which things are moving forward in

Figure 4. Example of Organizing Panel Activities (Sheet two)

Drs. Carter, Hammer, Overhage, Sherrod
July 19, 1966
Page 3

this context, their foreshadowed impact, and the concepts to which they
lead--would mainly be covered by Carl Overhage.

        At this point, I should greatly appreciate hearing from you what
you think is wrong with this scheme, i.e. where it fails either to live
up to what has been the tradition so far or to accomplish what it is
meant to do, so as to require revision "in the large", and also whatever
suggestions or questions you may have concerning the identification of
your personal part.

                                Sincerely yours,

                                F. Joachim Weyl

cc: Dr. Cuadra

    Figure 4. Example of Organizing Panel Activities (Sheet three)

4.   ORGANIZING THE AUTHOR FORUMS

Because of the success of these sessions in the Chicago and Philadelphia
conventions, the use of author forums was decided upon very early in the
convention planning.

In both of these prior conventions the scheduling of the forums had drawn
criticism because forums on a given topic were invariably scheduled at the
same time, thus making it impossible for some specialists to attend the forum
of another specialist working in the same area. In Philadelphia, in addition,
the number of concurrent forums ranged from 3 to 22, with a severe diluting
effect on attendance in the latter instance. Another major problem was the
failure of some authors to show up for their forums.

On the basis of past experience and the general program concept for 1966, the
following guidelines were formed for the author forums:

1.   Make the Author Forums a prominent feature of the convention.

2.   Schedule a uniform number of concurrent forums for each author forum
      session (somewhere between six and ten).

3.   Distribute forums on a given topic throughout the week rather than in
      one session.

4.   Give the authors uniform instructions on what is expected of them (a
      10-15 minute presentation prior to starting the discussion).

5.   Convey, through every contact with authors, the idea that acceptance
      of their paper involves an absolute obligation on their part to conduct
      an author forum.

The figure of 48 author forums, in six sessions, was set early in 1965 and
(surprisingly) remained fixed thereafter. The other decision that had to
be made fairly early was on the due date for papers. This date was originally
set for July 1, 1966, three months before the convention. As more information
became available on the likely printing cycle for the Proceedings, the date
was moved up to May 15.

The call for papers (see Figure 5) was scheduled for March 1, and the call
actually went out around that date. One omission on the call was subsequently
to cause many problems. We neglected to tell potential contributors in
what form the artwork should be. Many sent in graphic material that was
unsuitable for reproduction, and this necessitated much phoning and
corresponding and contributed to the delay in the production of the Proceedings.

CALL FOR PAPERS

The 29th Annual Meeting of the American Documentation Institute will be held in Santa Monica, California, on October 3 through 7, at the Miramar Hotel.

Theme of the meeting is "Progress in Information Science and Technology." We will welcome papers reporting on original research, significant trends, and new concepts, techniques, and applications of information science and technology. You are cordially invited to help create an interesting, varied, and informative technical program.

Accepted papers will appear in the Proceedings, to be available one month before the conference, and will be the focus of individual Author Forums.

An award will be given by ADI for the three best papers submitted for the meeting. To insure maximum visibility for exceptional work, these papers will also be read by the authors at a special plenary session.

Contributed papers may be up to 2,500 words in length and may include illustrations not to exceed two printed pages. Papers should he accompanied by a 100- to 125-word abstract. Five copies of paper and abstract should be submitted by May 15,1966. Contributors will be notified regarding acceptance of papers by August 1, 1966.

If you plan to submit a paper, please fill out the attached card and return it as soon as possible. Doing this does not imply a commitment on your part, but it will be helpful to us in allocating time blocks for the Author Forums.

Send To: Dr. Carlos A. Cuadra
               Technical Program Chairman, 1966 ADI Meeting
               System Development Corporation
               2500 Colorado Ave.
               Santa Monica, Calif.

1966 ADI MEETING

I plan to submit a technical paper with the following working title:

Reminder

1966 ADI MEETING

October 3 - 7, 1966

Name ...

Affiliation ...

Address ...

**Place: Miramar Hotel
Santa Monica, Calif.**

City ...   State ...   Zip ...

**Deadline for Papers:
May 15, 1966**

Figure 5.   Call for Papers

Attendants at previous conventions had complained that their contributions were not acknowledged and that they had not known they were on the program until it was printed, one month prior to the convention. We determined to follow a very strict acknowledgment procedure, not only as a matter of courtesy, but as a means of conveying the idea that all of us--convention planners and contributors of papers--needed to behave in a very businesslike and responsible fashion if the convention was to meet our expectations.

As soon as a paper was received, it was entered on a log and a letter of acknowledgment (See Figure 6) was sent. Papers were received from around May 1 until July 1, 45 days after the official deadline. In most instances, authors of late papers telephoned or wrote for permission to submit a paper past the deadline. It was always granted, with a specific date, varying from two to four weeks, from the May 15 deadline.*

Well prior to the receipt of papers, a review mechanism was set up for them. Nominations for "good reviewers" were requested from all members of the convention planning committee, and a panel of 20 reviewers was created to screen the contributed papers. Most of the reviewers were located in the Los Angeles area, but in two topical areas where well-qualified local people could not be found, reviewers in other parts of the country were used.

As papers were received, the head of the paper-screening committee assigned it to a topical area and hence to a particular pair of reviewers. A secretary sent the two reviewers copies of the paper and blank rating forms (See Figure 7). On each form she placed a "due" date that was two weeks after the one on which she was sending out the papers. When papers were not received on the due date, it was her job to telephone the delinquent reviewer and prod him.

As the ratings were received, the rating forms were scored and a total score entered on the master log. Where papers were clearly going to be accepted-- for example, those marked "excellent" by both reviewers--the Editor of the Proceedings was notified, so that he could begin preparing the paper for submission to the printer. All other papers were held, pending receipt of ratings on competing papers.

Within a short time after a paper was definitely known to be accepted, a form letter (See Figure 8) was sent to the author informing him of that fact and asking him to do two things: (1) acknowledge his understanding that he

---

*Some contributors ignored or failed to notice the 2,500 word limit. If it was felt that the paper was potentially valuable to include, the author was invited to trim the paper down, and he was given additional time to do so. Most such invitees resubmitted their papers.
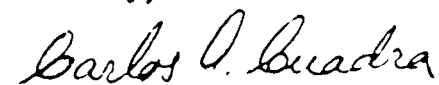
This will acknowledge receipt of your paper submitted for the Proceedings of the 1966 annual meeting of the American Documentation Institute.

We hope to be able to complete reviewing of all papers by the end of June, and to notify you concerning acceptance of the paper by July 15.

If there are any questions, you can contact me or E. M. Wallace at System Development Corporation, 2500 Colorado Avenue, Santa Monica, California.

Sincerely,

Carlos A. Cuadra
Technical Program Chairman
1966 ADI Meeting

CAC:ch

Figure 6. Letter of Acknowledgment Sent to Authors

This is a letter of transmittal of papers submitted to the American
Documentation Institute for publication in the 1966 Proceedings and
later discussion in Author Forums at the Annual Meeting in October.
Each paper is accompanied by a rating form on which to record your
judgments. It is very important, in view of the very short editing
and publication cycle, that you observe the deadlines indicated in
the upper right corner of the rating form.

I want to thank you in advance for agreeing to participate with such
short notice in the review of these papers. We are sure that your
assistance will help us to develop a technical program that will be
of real value and importance to participants in the annual meeting.

If you have any questions, please do not hesitate to contact me,
or in my absence, Everett M. Wallace. We can be reached at
EXbrook 3-9411.

                         Sincerely,

                         Carlos A. Cuadra
                         Technical Program Chairman
                           1966 ADI Meeting

                         System Development Corporation
                         2500 Colorado Avenue
                         Santa Monica, California

CAC:ch
Enclosure

Figure 7. Cover Letter and Rating Form Sent to Reviewers (Sheet one)

REVIEW OF PAPERS FOR THE PROCEEDINGS OF THE
AMERICAN DOCUMENTATION INSTITUTE
ANNUAL MEETING 1966

RATING FORM

Author: Date sent Reviewer:
                                          Date Due C. A. Cuadra:
TITLE: Address: System Development Corp.
                                                    2500 Colorado Ave.
Reviewer: Santa Monica, Calif 90404

Tentative Session Assignment:

The attached paper is sent you to review and evaluate with respect to its over-
all quality as a candidate for publication in the Proceedings and for discussion
in an author forum at the meeting. The above session assignment reflects the
categorization of the meeting's Progress Review Sessions, as per the preliminary
program. If you disagree with it, please feel free to suggest another. Some
papers may not fit gracefully with any of them.

The following rating categories are intended to help us accept or reject the
paper for publication and subsequent discussion, and to compare its virtues
with others of like character when a choice must be made among candidates. For
marginal papers, it will be helpful to have your comments on defects and how
they might be repaired.

1. Over-all Quality - check one
    Excellent_____   Good _____   Good-enough _____   Marginal _____   Poor _____

2. Technical Quality - check one
    Excellent_____   Good _____   Good-enough _____   Marginal _____   Poor_____

3. Originality - check one to indicate the degree of novelty or innovation
    Highly Original _____   Original _____   Somewhat Original _____   Not Original _____

4. Current Interest - Whether or not particularly original, is the paper of sufficient
    interest and importance to warrant publication and discussion? Yes _____,
    No _____. Assuming an attendance of 600 at the meeting, what is your best
    guess as to the number of people who would like to attend an author forum
    based on this paper? _____.

5. Literary Quality. Is the presentation and style clear? _____
    Are the figures adequate? _____. Are the references adequate? _____.
    Please comment below on any negative judgments.

6. Comment. Please comment below and on the verso of this sheet.

Figure 7. Cover Letter and Rating Form Sent to Reviewers (Sheet two)

Dear Colleague:

I am pleased to inform you that your contributed paper entitled _____

_____

has been accepted for presentation at the 1966 ADI meeting. The Program
Committee considers that your submission of a paper constitutes a firm
commitment on your part to be present at the convention for the Author Forum,
and the schedule will be prepared accordingly. Final programs, showing the
date, time, and room schedules will be mailed before the middle of August.
Also, sometime during the next 30 days you will be receiving galley proofs
from the printer.

For your Forum, please plan to lead off the discussion with a 10-15 minute
summary of your contributed paper, in order to permit the widest possible
audience understanding and participation. The remainder of the hour may be
devoted to discussion, answering questions, or presentation of more recent
related work.

The Program Committee can make arrangements to provide projectors and operators.
We prefer to use 35 MM (2 x 2) projectors but will attempt to meet requests
for other equipment. Whether or not you intend to use visual aids, please fill
out the enclosed acknowledgment and equipment request and return it to us as
soon as possible.

Thank you again for your contribution. We look forward to your participation
in the meeting.

                                   Sincerely,

                                   Carlos A. Cuadra

                                   Carlos A. Cuadra
                                   Technical Program Chairman
                                   1966 ADI Meeting
                                   System Development Corporation
                                   2500 Colorado Avenue
                                   Santa Monica, California

CAC:ch

        Figure 8.   Letter to Accepted Authors and Equipment List (Sheet one)

Dr. Carlos A. Cuadra
Technical Program Chairman
1966 ADI Meeting
System Development Corporation
2500 Colorado Avenue
Santa Monica, California

Dear Dr. Cuadra:

I hereby acknowledge receipt of notice that my paper

has been accepted for publication in the Proceedings and discussion at an
Author Forum. I understand that this acceptance reflects a firm commitment
on my part to be present at the convention to lead this discussion.

For my Forum, I will require:

	Yes	No
Blackboard	_____	_____
Pointer	_____	_____
35 MM Projector	_____	_____
Projector operator	_____	_____
Tape recorder	_____	_____
P. A. System	_____	_____
Other (specify)	_____	_____

Author's Name   _____

Affiliation (as it should appear in program) _____

_____

Address   _____

_____

Figure 8. Letter to Accepted Authors and Equipment List (Sheet two)

was obligated to conduct an author forum, and (2) request any audio-visual devices he would need for his forum. (At times the wisdom of the decision to provide extensive audio visual support seemed questionable. See Section 11 for further discussion of this point.)

A final letter was sent to authors of accepted papers in August. The letter (see Figure 9) acknowledged <u>their</u> acknowledgment, indicated that the audio-visual support requested would be provided, and reminded them of the necessity to check their slides, etc. for clarity and visibility.

The list of rejected papers was not finally known until mid-July 1966, at which time a letter of notification (see Figure 10) was sent out to these authors.

In July 1966, after all the contributed papers had been decided upon, and when the available rooms at the convention hotel were definitely known, the papers were assigned to various author forum sessions. Several fairly simple rules were followed:

1. Take papers within the same topic group and distribute them among the six author forum sessions. Do the same for each topic group.

2. Check the layout and make "trades" where an undue burden is placed on the audio-visual support system (e.g., where outdoor areas must be used but the authors need to show slides).

3. Check the overall layout and make "trades" where two papers from the same company are given in a particular session.

Three persons made estimates of attendance at each forum. The average predicted attendance was compared with the sizes of available rooms and the best possible match was made. It was assumed that the estimates would not always be correct and that provision needed to be made for room shifts. This proved to be the case for 6 out of the 49 forums. This problem is discussed in Section 10, Handling Room Space.

Dear Author:

Thank you for sending us the checklist of equipment requirements. We have made arrangements to provide the equipment you requested.

If you have not already done so, I would suggest that you pre-check any slides or other visual material for visibility. On the basis of past experience, we can predict that attendance at author forums may range from a few dozen to more than a hundred persons. Therefore, the amount of material on each slide should not be great and the lettering should be as large as possible. You may also find it advantageous to use white lettering on a black background, which makes it easier to use "flashlight pointers."

Some speakers find it useful to use blank slides in lieu of turning room lights up and down. Whatever you choose to do--and whether or not we are providing the operator--please be sure that your slides are clearly numbered and that the numbers are keyed to your text.

As I indicated in a previous letter, the Author Forums are intended to be very informal, with a great deal of audience participation and discussion. You should plan to give no more than a 10-15 minute summary of your paper, and then use the remainder of the scheduled time for discussion. In most instances there is only a ten-minute interval be-tween the conclusion of your forums and the beginning of another convention event. Therefore, I am sure that your audience will appreciate your concluding your session promptly. One technique you may wish to use is to stop the discussion five minutes before the scheduled closing time, in order to make one or two concluding comments yourself and to thank the audience for their participation.

I intend to have "watchdogs" at all Forums to see that the audience can be seated comfortably in the space provided. In the event that we have guessed incorrectly about audience size, we will endeavor to make quick room changes, where possible.

Figure 9. Acknowledgment of Author Equipment Requirements (Sheet one)

I assume that you have received your copy of the final program, which gives scheduled times and rooms for all convention events. All of us who have worked on the program are very pleased with the high level of technical quality that we believe has been achieved, and we wish to thank you in advance for your contribution to the program.

Sincerely,

Carlos A. Cuadra

Carlos A. Cuadra
Technical Program Chairman
1966 ADI Meeting

CAC:ch

Figure 9. Acknowledgment of Author Equipment Requirements (Sheet two)

We appreciate the professional interest you have shown in submitting
a paper for publication in the ADI Proceedings and for discussion at
the October 1966 meeting. Unfortunately, the format selected for this
year's convention did not permit us to accept as many papers as in
previous meetings. As in past years, the Program Committee was faced
with the difficult task of accepting only a portion of the papers
submitted. As Chairman of the Program Committee, I regret to inform
you that your paper,

has not been accepted for inclusion in this year's program.

As you know, it is vital to the future of information science and
technology that individual workers in the field report their research
and achievements. Although we were unable to include your paper in
this year's program, I hope that this will in no way discourage you
from taking advantage of other means to bring your work to the
attention of the information community.

                                        Sincerely,

                                        Carlos A. Cuadra, Chairman
                                        1966 ADI Program Committee
                                        System Development Corporation
                                        2500 Colorado Avenue
                                        Santa Monica, California

CAC:ch

Figure 10.   Reject Letter to Authors

5.   SELECTION OF THE PRIZE PAPERS

Somewhat over 60 papers were submitted to the convention. By means of the
review mechanism described in Section 4, the 12 top papers from this group
were selected. These papers were then sent on July 25, 1966, to a special
committee that had been set up to select three prize papers. (Plans for
this committee were made in October 1965, and the Chairman, Dr. Richard Orr
was invited to serve in January 1966, but no actual work was performed by
the committee until they received the papers in July.

The Chairman of the prize paper committee selected two additional judges
who were widely read and had a broad interest in the information field.
These qualifications were deliberately set to contrast with the specialists
who did the first round of judging. Whereas the first judges considered
primarily technical quality, originality, and overall quality, the three
judges rated the final 12 papers according to their opinion on how large
an impact the paper might have on the field of documentation. Although
the three judges rated the 12 papers inc ~endently, there was very good
agreement among them on the top three pa,.rs finally selected.

Approximately three weeks before the convention, the program chairman
was notified of the three winners. He personally contacted each of them
to (1) inform them that they had won one of the awards, (2) alert them to
the fact that they were to give a presentation during the "prize papers
session," in addition to their already scheduled author forum, and (3)
request that they make sure that any visual materials used in connection
with their paper be suitable for an audience of at least 500 persons. In
order to maintain the surprise element in the program, they were also asked
not to disclose the fact of their award prior to the convention.

Members of the program committee selected an appropriate type of plaque and
composed a suitable inscription:

                    American Documentation Institute
                         Prize Paper Award
                          Presented To

        In recognition of an outstanding technical contribution to
        the 29th Annual Meeting of the ADI.
                    Santa Monica, California
                      October 7, 1966

The Chairman of the Prize Papers Selection Committee also chaired the Prize
Papers Session at the convention and gave out the plaques as he announced the
winners, in turn. Plaques were given to co-authors as well as senior authors,
with identical wording on the plaques.

6.   ORGANIZING THE DISCUSSION GROUPS

Preliminary thinking about the Discussion Groups called for 16 groups, in
two sessions. In several previous conventions, the topics had been
suggested by Calvin Mooers, and he was again asked, in October 1965, to
suggest timely and interesting topics and discussion leaders for the 1966
convention. He agreed to do so.

A suggested list of 10 topics and possible discussion leaders was submitted
to the Program Chairman in February 1966. Each topic was described in a
100-200 word abstract, which was later used for the printed program. The
topics were discussed by the Program Chairman and the General Chairman, and
three additional topics were suggested for consideration by the Discussion
Groups chairman. Discussion leaders were suggested for these, and some
discussion leader additions and preferences were given in connection with
the original 10 Discussion Groups. One added group resulted from a
suggestion from an ADI member that there be a panel or other event on
machining of text. Since the convention format precluded panels for other
than major Progress Review sessions, the suggestion was implemented by
inclusion in the Discussion Groups.

This feedback was provided to the Discussion Groups Chairman in May 1966.
At that time he was asked to make the final selections of topics and proceed
to invite Discussion Group leaders. By the end of June, this job was almost
complete, and the last Discussion Group leader was identified in early July,
in time for the final program.

The Discussion Group chairman felt that the discussions were always more
worthwhile if attendees had to "work" to get into them. Accordingly a
signup procedure was used. Signup cards were left at two points in the
hotel lobby until the day prior to the Discussion Groups. Cards were
collected three times. Each time they were sorted into sessions, counted
and labeled as to priority (first come-first served). It did not prove
necessary to have anyone settle for his second-choice Discussion Group.

Typed lists of "accepted" applicants were posted on the day of the Discussion
Group session. In most instances the attendance exceeded the signups by
about 5-10%.

7.   ORGANIZING THE TUTORIAL SESSIONS

The decision to have Tutorial Sessions was made almost at the very beginning
of the convention planning cycle. As of April 1965, it was decided that the
Tutorials should run for one half-day, the afternoon of the "preconvention"
day. This time was set to permit those flying in from the East to attend
these sessions without an extra day away from home.

No action was taken on the Tutorials until October 1965, when Robert Hayes
was asked to take responsibility for them. In December 1965, he submitted
a list of possible topical areas and leaders, and in January 1966, he
extended invitations to the persons agreed upon for the six areas finally
selected:

1.   Information System Design

2.   Information Center Operations

3.   Usage of Information

4.   Evaluation of Hardware and Software

5.   Language Data Processing

6.   Development of a Theory

The decision was made, in January 1966, to increase the time for the
Tutorials to six hours, almost the full preconvention day. A 10:00 a.m.
to 12:00 and 1:30 to 6:00 p.m. schedule was decided upon, to dovetail with
the Student Papers and Panel Sessions.

By February 1966, five of the invitees had accepted. A suitable leader for
the one remaining tutorial was not found for several additional months.

In August 1966, all tutorial session leaders were asked to submit their
audio-visual requirements, and they did so. Most required only blackboard
and chalk, though a few used slides.

Attendance for the tutorials was expected to be from 25-75 persons,
primarily students and "newcomers." In fact, the attendance ranged from
150 to over 300 and would probably have been larger if the available room
had not been so confining. It was obvious that the attendees were not all
newcomers. The tutorial sessions apparently were used by many as a
refresher or as a means for getting a "framework" in particular areas not
already familiar to them.

8.   ORGANIZING THE EXHIBITORS' PRESENTATIONS

Exhibitors' Presentations were considered to be a part of the technical
program because they were intended to be more in the nature of technical
presentations than sales presentations. Two major personnel changes in
the Exhibits planning function produced something of a communication lapse,
and the original intention was not carried through in all respects.

Early in the convention planning, a block of time was set aside in midweek
for the Exhibitors' Presentations, so that this "event" could be mentioned
by the Exhibits Committee in approaching potential exhibitors. The time
to be allowed ranged, at various planning stages, from 2 to $3\frac{1}{2}$ hours,
finally ending up at $2\frac{1}{2}$ (See Figure 11 for the schedule). While it was
considered possible that exhibitors might need to make more than one
presentation (as was done in Chicago in 1963), this did not actually prove
necessary.

Most of the exhibitors provided their own audio-visual support. The chief
problem, from the standpoint of program planning, was to get the exhibitors
to provide a title of the presentation and the name of the person who would
give it. Because of delays in obtaining these, it was decided not to
attempt a listing in the final printed program. They were, instead, given
in a special handout enclosed in the registration packet.

Other comments on the Exhibitors Presentations are given in the report of
the Exhibits Committee.

EXHIBITORS TECHNICAL PRESENTATIONS SCHEDULE

	California Room	E. Aviation Room	E. Satellite Room	Lanai Room
*1:00 PM	Western Reserve University	International Business Machines Corporation	Xerox Corporation & University Microfilm Inc.	
:15				American Library Association
:30	Special Libraries Association			
:45		National Cash Register Company		John Wiley & Sons, Inc.
2:00 PM	Encyclopedia Brittanica		Godfrey Memorial Library	
:15		System Development Corporation		Jonker Corporation
:30	Bro-dart Industries		Minnesota Mining & Mfg. Co., Inc.	
:45		Information Retrieval, Inc.		National Library of Medicine
3:00 PM	Houston Fearless Corporation		Fairchild Hiller Corporation	
:15				

*Wednesday, October 5, 1966

Figure 11. Exhibitors Technical Presentations Schedule

9. SELECTION OF INVITED SPEAKERS

"VIP" speakers are a standard feature of most conventions. While it was
taken for granted that the 1966 ADI convention would have such speakers,
specific candidates were not seriously discussed until September 1965, when
an invitation to Vice President Humphrey was set in motion. He was selected
not only for the "VIP" status but because of his previous interest in the
information field, as a U. S. Senator.

The invitation to the Vice President was formally extended in November 1965
through Dean Shera, of Western Reserve University, who had had prior contacts
with the Vice President. The invitation was acknowledged in the same month,
with the statement that a firm decision could not be reached until July 1966.
In July 1966, the Vice President sent his regrets but promised a message
to the convention, which was received on the opening day of the meeting and
read to the audience.

At the same time, invitations were also discussed for other guest speakers.
In January 1966, an invitation was extended to Vannevar Bush; it was declined,
because of illness. In February 1966, arrangements were made with Ken Lowry
to extend an invitation to Nikolay B. Arutiunov, of the USSR. The invitation
was formally extended in April but was declined. In March, Dr. S. I. Hayakawa
was invited to address the convention and agreed to do so. In June, California
Governor Edmund G. Brown and Santa Monica Mayor Rex Minter were invited to
give welcoming or other remarks. The Mayor accepted; Governor Brown sent
his regrets. (It was not expected that all invitees could accept, so more
speakers were invited than there were "speaker" slots programmed.)

In July, Robert Vosper was invited to give the keynote address and agreed to
do so.

The invitation to the Vice President imposed some problems on convention
planning. It was felt that several time slots needed to be offered, in
order to maximize the chances of working the convention into the Vice
President's schedule. The inability to obtain a decision until late June
1966, kept many elements of the program in a state of flux and required a
sizable flurry of activity just prior to the printing of the final program.

Guidance for the guest speakers was minimal. The keynote speaker selected
his own topic, after some discussion regarding the general content of the
program. With Dr. Hayakawa there was an exchange of letters that helped
him and the Program Chairman zero in on the most appropriate topic,
"Information and Communications: A Semantic Viewpoint."

The sessions during which the guest speakers spoke were plenary sessions,
with no competing activities scheduled. In the case of the keynote speaker,
the introduction and closing comments for the session were made by the

convention chairman, Dr. Borko. The Program Chairman did the honors for
Dr. Hayakawa.

The only known miscue occurred when Dr. Hayakawa arrived at the convention
at an unexpected time and all of the people who could have "met" him were
in a planning conference for the 1967 & 1968 conventions. Also, he was not
sure where the conference had made a hotel reservation for him, and the
people who could have told him were not available. Fortunately, neither of
these minor problems caused any difficulty or detracted from his very
successful presentation.

10.   HANDLING ROOM SPACE

Space requirements were among the very first ones considered for the convention.
In November 1964, one of the primary concerns in the inspection of hotels was
capacity both for large plenary sessions (with up to 800 attendees) and for
ten or more simultaneous small-group sessions. In point of fact, all the
hotels considered appear to meet both these requirements.

The convention hotel was selected by the Convention Committee in April 1965.
In June the hotel requested estimates of space needs (for the program--not
for guests), but the Program Chairman advised them that all hotel space should
be held until specifically released by the Convention Committee.

In May 1966, it seemed likely that the Convention Committee member who had
been responsible for space problems would not be able to carry out his duties
and they were informally and tentatively reassigned to be a joint function of
another committee member and the Program Chairman. The change helped to
postpone recognition of the fact that the hotel had made commitments of hotel
space during convention week to groups other than the ADI. This fact was
not uncovered until five days before the convention opened, and it caused a
good deal of last-minute room changing.

The earliest space allocation made was for the Exhibits area, in mid-1965.
This was required for adequate planning of the Exhibits promotional brochure
and the setting of decorator fees, etc. About a year later, the room
assignments of other program elements was started. The preliminary assignment
matrix was updated in July 1966, in time for the final program, and also in
August and September, when space was requested for a number of special events
(e.g., ADI Council meeting). The "final" revision was supposedly made in
September, but new requirements and the aforementioned last-minute problems
kept the room matrix fluid through the convention week. See Figure 12 for
the final" layout.

The Convention Committee planned on an attendance of 500-600. It therefore
appeared safe to plan using two rooms with announced capacities of 450 each
for the two concurrent Progress Review Panels. Unfortunately, no one
realized, until the convention began, that the reported capacities were some-
what overstated and the unexpectedly large turnout--approximately 750
registrants--strained the hotel's meeting-room capacity.

Most of the Author Forum sessions involved eight simultaneous Forums (one
session had nine). The Forums were assigned to rooms on the basis of
estimated attendance, but wherever possible, one or two large rooms were
held "on reserve" to handle possible overflow situations. Some of the Forums
were scheduled outdoors, and rooms inside the hotel were also necessary for
backup. Unusually cold and damp weather forced use of the rooms several

SPACE AND ROOM SETUP SPECIFICATIONS

1966 ADI Convention

Miramar Hotel - Oct. 2-7, 1966

SETUP #	ROOM LAYOUT	SPEAKER AREA LAYOUT
1	Theater	Rostrum and table for 6
2	Theater	Rostrum and table for 4
3	Theater	Rostrum on small table
4	Theater	
5	Large table in center of room	Small table only
6	As shown below	

Carlos A. Cuadra
Technical Program Chairman
September 20, 1966

Figure 12. Final Space and Room Specifications (Sheet one)

Figure 12. Final Space and Room Specifications (Sheet two)

Figure 12. Final Space and Room Specifications (Sheet three)
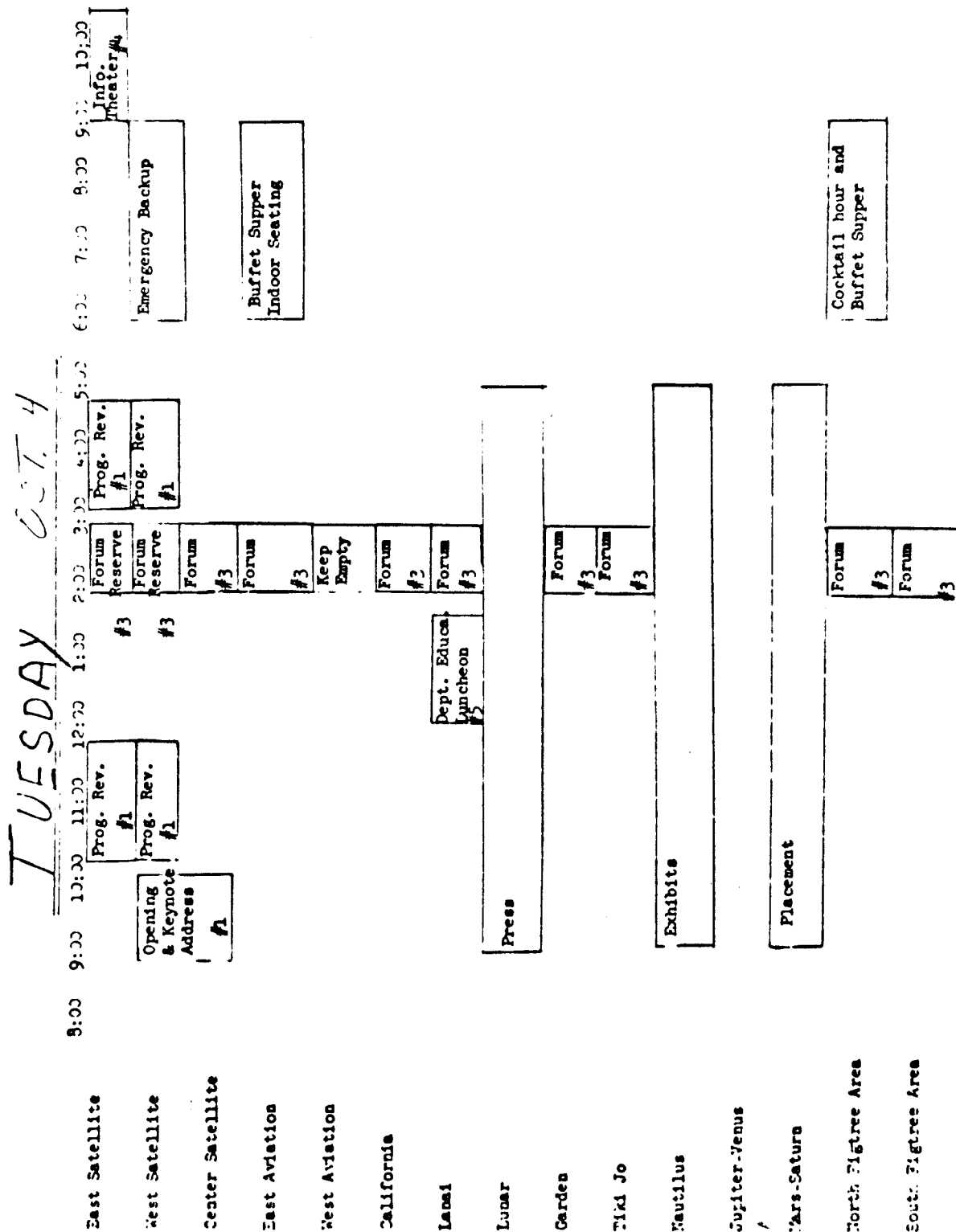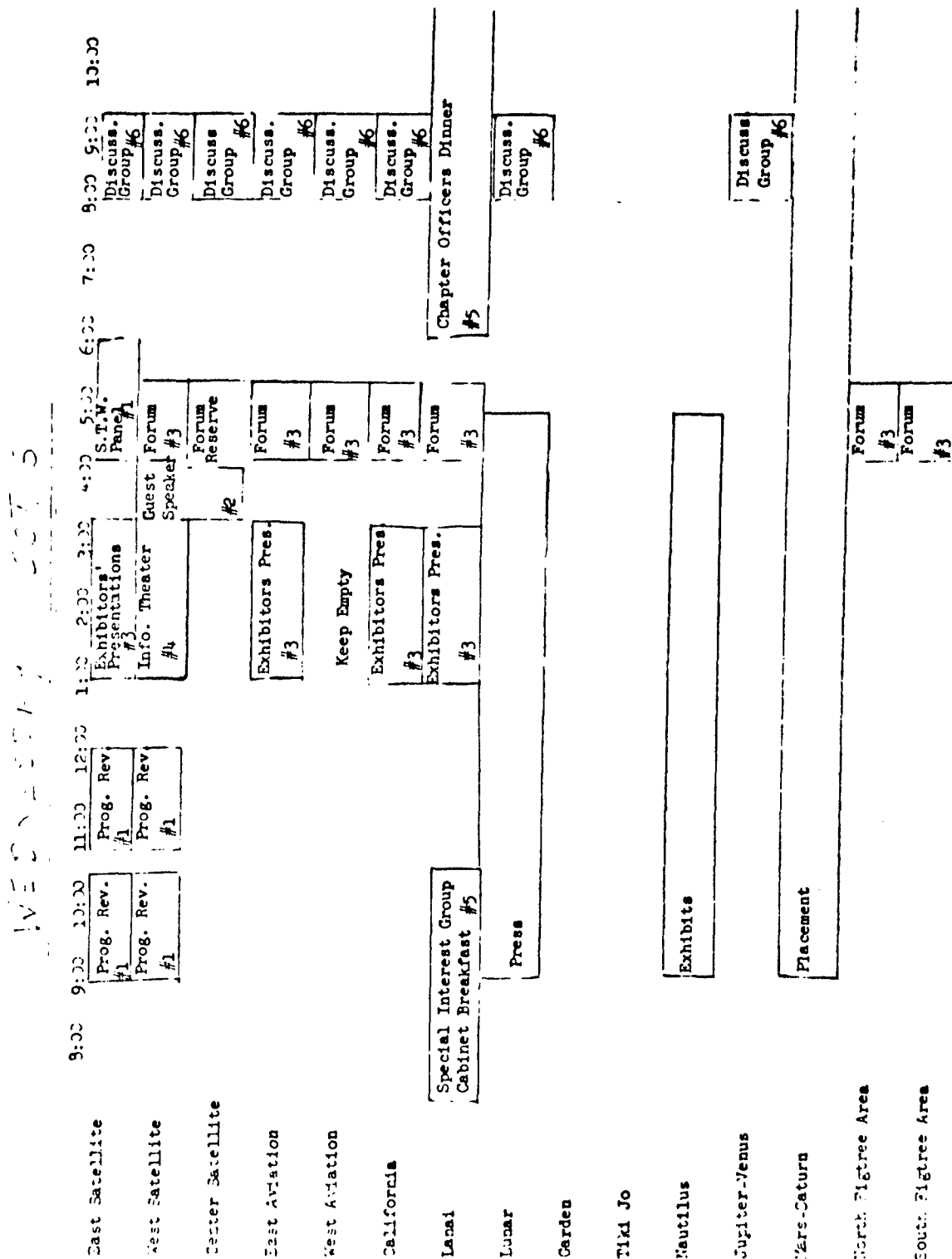
Figure 12. Final Space and Room Specifications (Sheet four)

Figure 12. Final Space and Room Specifications (Sheet five)
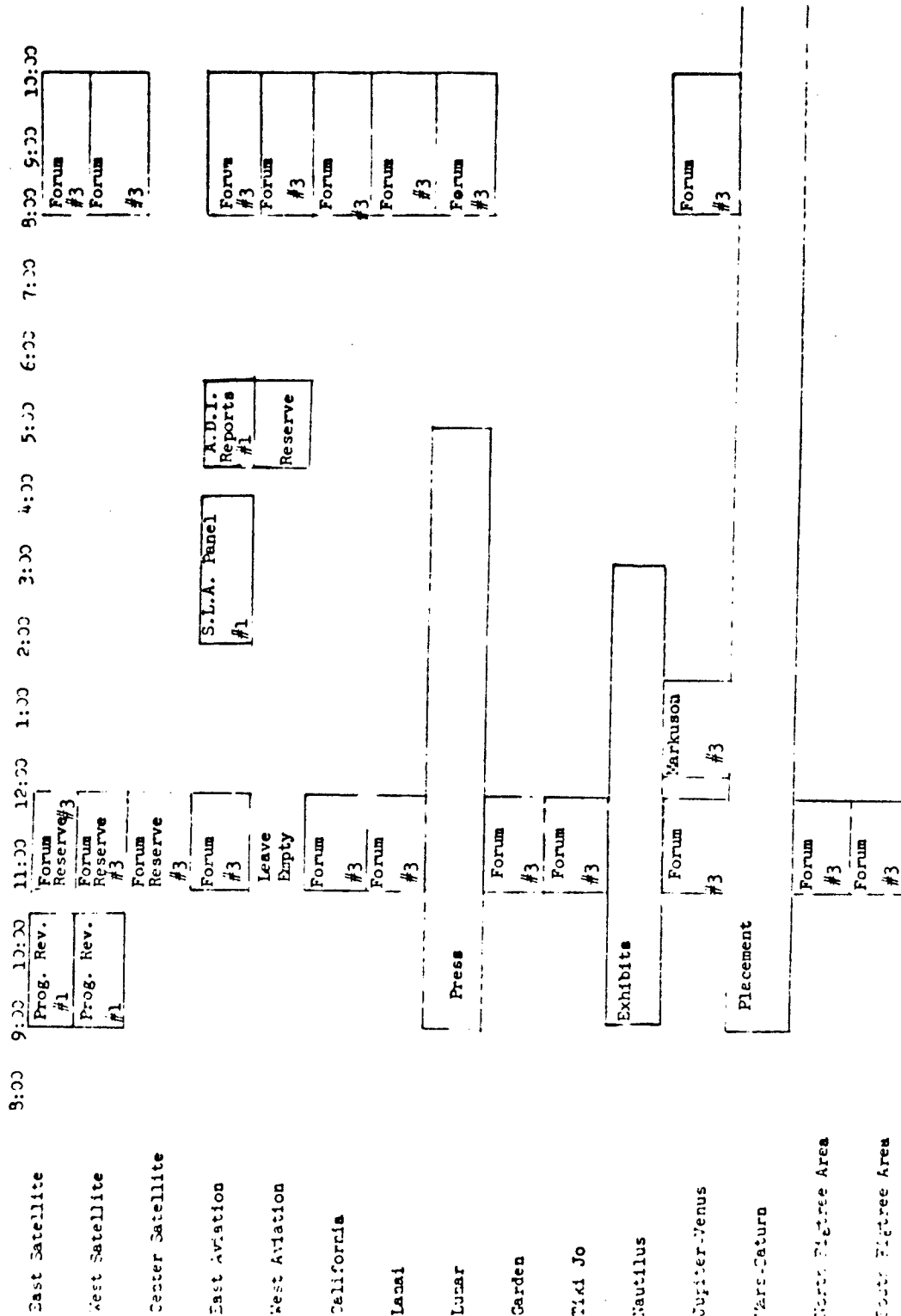
Figure 12. Final Space and Room Specifications (Sheet six)
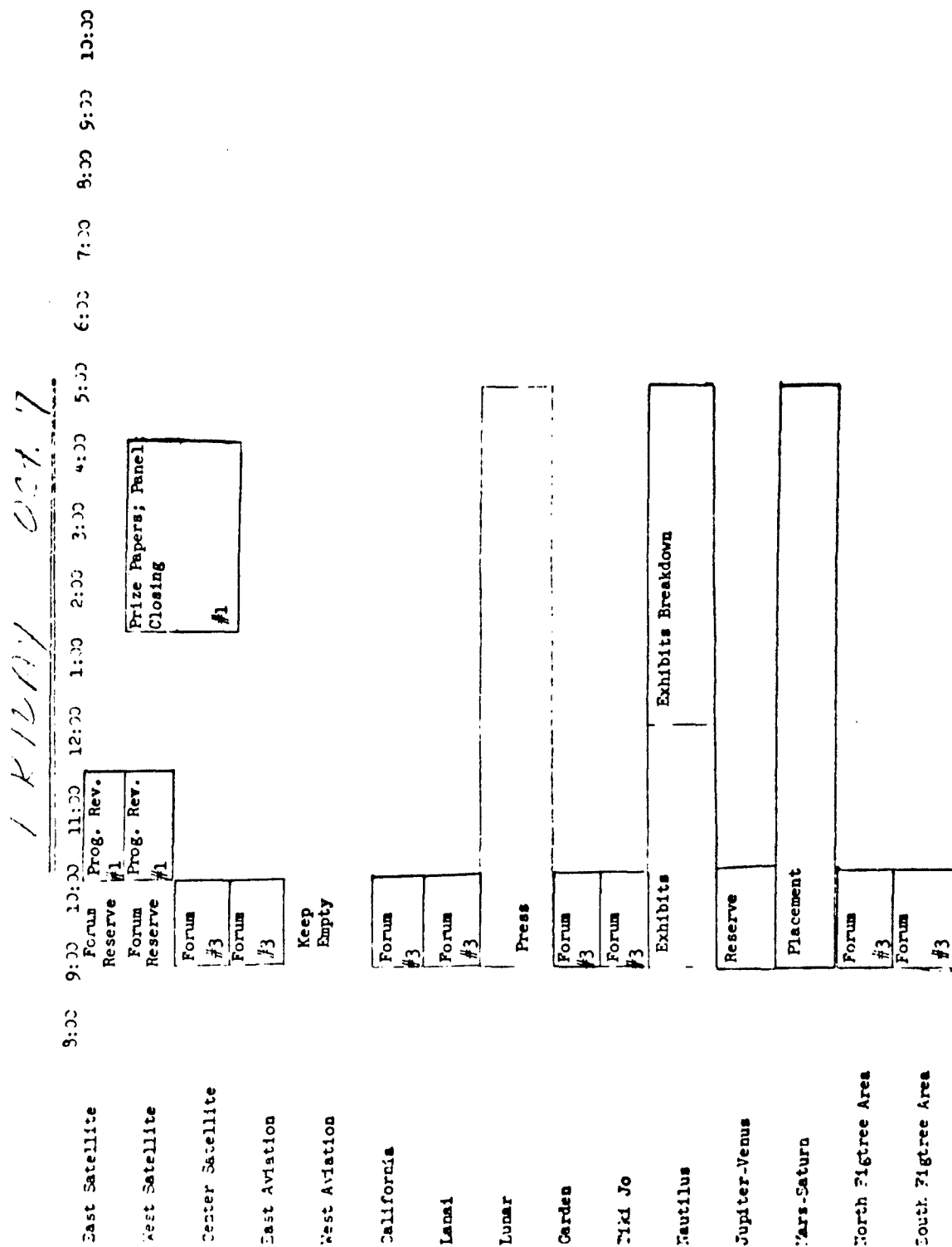
Figure 12. Final Space and Room Specifications (Sheet seven)

times. Other changes were brought a'out by last-minute author plans to show
slides, where they were scheduled for rooms without blinds.

Prior to the convention a number of signs reading
        "Room for (session name) changed to (new room name)"
were prepared. When a change was necessary, these signs were posted at both
old and new rooms involved. In addition, the Program Chairman or his
secretary prepared an announcement regarding room changes and passed it to
the chairman of any major sessions then in progress.

The primary problems in effecting room changes were (1) spotting the necessity
for a change and (2) insuring that any changes made were coordinated and con-
sistent with available space. Originally, the spotting plan was to have all
convention committees share this responsibility during multiple-meeting
sessions. This worked poorly, so the Program Chairman, two assistants and
the Audio-visual Committee did it instead. The Program Chairman was
designated as the single authority for room changes and this worked well,
except for the demands it placed on his immediate availability. In a hotel
with adequate meeting space, and with reasonably good general planning, very
few changes should actually be required. However, it seems necessary to
foresee the possibility of required changes, designate the person responsible
for effecting them, and provide adequate spotters and other backup (sign-
writers, sign-posters, announcement preparers, and messengers).

Space requirements and problems for areas other than the Technical Program
are discussed in separate Committee reports.

11.   HANDLING AUDIO-VISUAL REQUIREMENTS

Provision of audio-visual support was originally a function of the Local
Arrangements Committee. For a variety of reasons, it became, just prior to
the convention itself, a responsibility of the Technical Program Committee.
This committee was, of course, also responsible for **specifying** the audio-visual
requirements. Figure 12, discussed earlier in connection with room space, also
shows the audio-visual requirements.

There was no significant concern with audio-visual requirements until June
1966, when the authors of contributed papers that had been accepted were asked
about their requirements (see earlier Figure 8). Figure 13 summarizes the
requirements received. There were considerably more than had been expected,
and they proved to be a sizable chore. As far as we know, previous ADI
Author Forums have not been provided with this kind of support, and future
convention committees may wish to encourage alternative means of display, e.g.,
handouts, blackboards only, etc. In July and early August, similar inquiries
were made of other convention participants (e.g. Tutorial leaders), and some
"unsolicited" requirements were also received.

The 1966 audio-visual effort was fortunate in three respects. First, when it
became clear at the last minute that responsibility for the effort would have
to be placed in the Technical Program Committee, and an excellent person was
found to take this responsibility. Tom Hohl had not only managed the entire
audio-visual support for previous conventions but had done so at the Miramar
Hotel itself.

Second, System Development Corporation provided Tom with 13 projectors, 8
screens, 7 blackboards, 3 tape recorders, and 8 public address systems, and
4 capable assistants for the entire convention week, at no cost to the ADI.
The audio-visual staff performed the following functions, from September
through October 1966:

1.   Checked the preliminary audio-visual requirements lists and provided
      information on limitations of equipment and of the Miramar facilities.

2.   Converted the final requirements into a format suitable for managing
      the A-V work during the convention.

3.   Acquired all the necessary audio-visual equipment, checked out the
      operating condition of the equipment, and placed it in the
      appropriate locations.

4.   Provided operators to those who had requested them and had standby
      personnel for those who had not (they were used).

SESSION A	SESSION B	SESSION C	SESSION D	SESSION E	SESSION F
Pointer 35mm Projector 35mm Operator	Pointer, PA System Lantern Slide Pro- jector 3x4½ Operator	Pointer 35mm Projector & Operator PA System	16mm silent movie projector 3¼x4" slide Projector	Pointer Easel	Blackboard
Pointer 35mm Projector 35mm Operator	35mm Projector 35mm Operator	Pointer 35mm Projector w/ remote control PA System Viewgraph	Pointer 35mm Projector & Operator PA System	Blackboard Pointer	Blackboard, pointer 35mm Projector & Operator
Blackboard Overhead Viewgraph 35mm Projector 35mm Operator	35mm Projector 35mm Operator PA System	Pointer Blackboard PA System 35mm Projector & Operator	Blackboard 35mm Projector	35mm Projector & Operator	Blackboard Pointer
Viewgraph	Viewgraph Pro- jector (Opaque)	Blackboard 35mm Projector & Operator	Blackboard Pointer 35mm Projector & Operator	Pointer Blackboard 35mm Operator & Projector	Pointer Blackboard PA System 35mm Operator & Projector
Pointer 35mm Projector 35mm Operator	35mm Projector	Blackboard Pointer 35mm Projector & Operator	Pointer 35mm Projector & Operator	Pointer 35mm Projector w/ remote control	Blackboard 35mm Projector & Operator
Blackboard	Blackboard	Blackboard	Pointer 35mm Projector & Operator PA System		Blackboard
Blackboard Pointer 35mm Projector & Operator	Blackboard		Pointer Opaque Projector Opaque Operator		Blackboard
Blackboard	Blackboard Pointer		35mm Projector & Operator		

Figure 13. Summary of Equipment Requirements

5.   Adjusted microphones and audio volumes, gave any necessary instructions
      to session chairmen, and monitored tape-recording machines.

6.   Acted as spotters for necessary room changes, and shifted the A-V
      equipment where necessary.

7.   Made duplicate copies of the tape recordings, after the convention.

The only significant problem in the A-V area was one of sound seepage from
one meeting area to another. Although the convention committee had been
assured by the hotel that the rooms were well insulated for sound, this
proved not to be entirely true, and two or three sessions encountered sound
carryover. There would have been even more problems had not the Program
Chairman earlier checked out some of the rooms for ordinary voice carryover.

Regardless of the reputation of the convention hotel, it would seem desirable.
in future conventions, to check out the sound systems thoroughly and refuse
to accept statements about A-V facilities and characteristics that the hotel
is unable or unwilling to support by demonstration.

12.   COORDINATION WITH PROCEEDINGS

The Proceedings Committee started out, early in the planning process, as a subcommittee of the Technical Program Committee. By August 1965, after the decision was made that the Proceedings would include only contributed papers (and no special addresses or panel presentations), the Proceedings Committee acted largely as an independent element of the Convention Committee.

After an exchange of correspondence between the Program Committee and the Proceedings Committee, it was agreed, in September 1965, that the Proceedings should be in the hands of convention registrants one month prior to the convention. This decision, unfortunately, was forgotten at the time that a printer was selected for the Proceedings, and no provision was made in the contract for printing the Proceedings and mailing them in time to meet the date agreed upon earlier by the Convention Committee. The contract with the Proceedings printer was not brought to the attention of the Program Chairman, until after the (presumed) target date had already been missed. (See report of the Proceedings Committee for details.)

The contract with the printer recognized that there would be approximately 52 papers, each of approximately 2500 words and possibly including some figures. It called for delivery of 25% of the manuscripts by June 15 and the remainder by July 15. The Program Committee, accordingly, set up its paper-review mechanism to dovetail with this schedule, allowing sufficient time for the Proceedings editor to process the papers before his deadline with the printer.

Accepted papers were sent to the Proceedings editor as follows:

        June 2   --   7 papers
        June 6   -- 10 papers
        June 9   --   5 papers
        June 10 --   5 papers
        June 13   ·   3 papers
        June 20 --   9 papers
        June 21 --   1 paper
        June 23 --   1 paper
        July 5   --   6 papers
        July 8   --   1 paper

To expedite the preparation process, some "borderline" papers that had not definitely been accepted yet were mailed to the Editor in advance, with the understanding that some portion of them might not end up in the "accepted" group. He was later simply notified by telephone which papers were accepted.

Since mailing the Proceedings in advance was part of the overall plan for
upgrading the quality of technical discussion at the convention, the discov
that the Proceedings would be so late that they could not be mailed out in
advance was disappointing to everyone. To minimize the impact of the chang
the Proceedings editor sent out a letter to preregistrants notifying them
that, rather than have their Proceedings arrive after they had already left
for the convention, he would hold them for delivery at the convention itsel

The layout of the convention helped to minimize the inconvenience caused by
the late Proceedings. Only one group of author forums was scheduled for th
first day of the convention and, in an announcement, attendees were reminde
that the Forums within any session were on different topics. Therefore, th
would need to read only the titles and/or abstracts to decide which Forum
to attend, and they would need to read only one paper prior to the first gr
of Forums.

The coordination problems experienced with the Proceedings probably stemmed
from two causes. First, because of a job change, the head of the Proceedin
Committee was located several hundred miles from the rest of the Convention
Committee and was not able to attend most of the meetings in person.
Therefore the opportunity to discover the communication lapse on the target
dates was not readily available either to him or to other Committee members.
Second, the coordination mechanism across Committees was fairly weak and
ineffective, and too much reliance had to be placed on accidental discovery
of problems.

13.   EVOLUTION OF THE DETAILED CONVENTION PLAN

As indicated earlier, the basic convention concept developed by February 1965, and described earlier in Section 1, was maintained throughout the convention planning effort. The details of the program changed a good deal in the next year and a half, enough to require ten iterations of the convention calendar. Some of the changes were to incorporate new elements into the program; others were to improve the "pacing" and flow of various elements. A number of the changes resulted from feedback requested and received from various ADI members.

Four of the ten iterations of the convention calendar are shown in Figures 14 through 17. (The tenth iteration was the final printed program.) The most significant changes and the reasons for making them are given below:

Plan #2--June 1965--Figure 14

1.   Added closing panel on "Whither Information Science?"

2.   Added approximately 20 Author Forums, for more member participation.

3.   Added time slots for invited speakers and social events.

4.   Trimmed guessed-at 14 Progress Review Panels to 11, corresponding to confirmed Annual Review Chapters.

Plan #3--August 1965--(Not illustrated)

1.   Added a Prize Papers Session to the program.

2.   Reversed the days scheduled for Tours and Exhibitors Presentations, because tours on the first day made the program appear to lack sufficient technical substance.

Plan #4--November 1965--Figure 15

1.   Added Keynote address.

2.   Added Progress Review Panel 12 (National Information Issues & Trends).

3.   Scheduled all Progress Review Panels in pairs.

4.   Moved Reception-Dinner to opening night of convention.

5.   Canceled one session of eight Discussion Groups, to accommodate higher priority elements.

6.   Moved Author Forum into the first day, to add more "substance."

7.   Moved Prize Papers session to evening, to help provide a larger audience for the "ADI Reports" meeting.

PRELIMINARY SCHEDULE FOR 1966 ADI MEETING:

"PROGRESS IN INFORMATION SCIENCE AND TECHNOLOGY"

Pre-Convention

Monday	Tuesday	Wednesday	Thursday	Friday
9:00 ADI Council Meeting / ADI Chapter Officers / Workshop and Advisory Board Meeting	9:00 Welcome / 9:15 Convention Plan / 9:30 PR-1* Need for Info. & Info. Systems	9:00 PR-3: Content Representation — PR-5: Info. Systems Applications	9:00 PR-7: Automated Language Processing — PR-9: Professional Aspects of Info. Science	9:00
	11:00 PR-2: Library and Information Center Automation	10:30 PR-4: Information Structuring and Search — PR-6: Management Aspects of Info. Centers	10:30 PR-8: New Hardware Developments — PR-10: Man/Machine Communication	10:30 (Author Forum) / 11:00
12:00	12:00	12:00 Luncheon and Invited Address	12:00 Luncheon	12:00
1:30-6:00 Tutorial Sessions	2:00 T O U R S	2:00	1:00 Exhibitors Presentations	1:30 PR-11: Design and Evaluation
		3:15		3:00 Panel: Whither Information Science?
		4:30 (Author Forum)		4:00 Convention Closing
	5:30 Cocktail Hour	5:30 Cocktail Hour	5:00 L U A U	
6:00 Information Theater**				6:00 Bus to Disneyland
7:00 Reception				
	8:00 Discussion Groups (8-10)	8:00 Discussion Groups (8-10)	8:00 Invited Speaker / 9:00 "The ADI Reports" (including Presidential address)	

*PR--Progress Report

** The Information Theater will run from 6-9 p.m. Monday; 12-5p.m. Tuesday; and 12-5p.m. Thursday.

Figure 14.   Convention Calendar--Plan #2

TENTATIVE PROGRAM FOR 1966 ADI MEETING

"PROGRESS IN INFORMATION SCIENCE AND TECHNOLOGY"

	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
9:00	Welcome / Convention Plan (KEYNOTER)	9:00 PR-3 / PR-4	9:00 PR-7 / PR-8	9:00 7 Author Forums
10:30	10:30 PR-1 / PR-2	10:30 PR-5 / PR-6	10:30 FR-9 / PR-10	10:15 7 Author Forums / 11:30 7 Author Forums
12:00		12:00	12:00 Luncheon and Invited Address	
2:00	2:00 8 Author Forums	2:00 (To be scheduled)	2:00 TOURS	1:30 PR-11 / PR-12
3:00	3:15 8 Author Forums	3:00 EXHIBITORS' PRESENTATION	INFO THEATER	3:00 Panel: "Whither Information Sciences"
4:00	4:30 8 Author Forums			4:00 Convention Closing
6:30				6:30 Bus to Disneyland
7:00	RECEPTION		7:30 "The ADI Reports"	7:30 - 12:30 SDC-ADI Night at Disneyland
8:00	BUFFET LUAU	8:00 8 Discussion Groups	8:30 PRIZE PAPERS	
INFO. THEATER		INFO THEATER		

PRE - CONVENTION

Carlos A. Cuadra
5 November 1965

Figure 15. Convention Calendar--Plan #4

Plan #5--January 1966--(Not illustrated)

1. Moved Prize Papers to morning of the final day, for suspense.

2. Moved "ADI Reports" and Awards into afternoon, to have awards prior to
    Presidential cocktail party.

3. Lengthened Tutorial Sessions from 4½ to 6 hours, moving some of them
    into morning of first day.

4. Added Student Program (paper session and panel), scheduling it to
    minimize conflict with the tutorials.

Plan #6--February 1966--Figure 16

1. Added SLA Panel to program, splitting the time slot with tours.

2. Moved a pair of Progress Review Panels into the first day, and moved
    some Author Forums back, to give participants more time to read
    proceedings before the Author Forums started.

3. Altered particular pairings of Progress Review Panels to reduce conflict
    of interests.

4. Moved Prize Paper Session into final segment of program, for suspense.

Plan #7--June 1966--(Not illustrated)

1. Added STWP Panel, to run concurrently with one session of Author Forums
    because no "blank" space was available.

Plan #8--July 4, 1966--(Not illustrated)

1. Identified guest speakers.

2. Added invitational meeting of Behavioral Scientists on preconvention day.

Plan #9--July 15, 1966--Figure 17

1. Interchanged two Progress Review Sessions to reduce conflict.

2. Deleted identification of luncheon speaker, since no confirmation had
    been received.

Plan #10--Actual convention program

1. Cancelled banquet luncheon & invited address.

Figure 16. Convention Calendar--Plan #6

Figure 17. Convention Calendar--Plan #9

Unless the convention committee is omniscient or no new program elements are considered in the year or two during which the convention is being planned, many significant changes are bound to occur. In the 1966 convention, fluidity in the developing program caused problems for several committees, particularly the Publicity Committee, which, on one or two occasions prepared publicity releases that used incorrect (i.e., obsolete) information. One means for preventing similar problems would be to inform that Committee of each change in the program, as it occurs. This would have been very cumbersome in 1966, because so many changes occurred that would have been significant from the publicity standpoint. A better system, which was not followed consistently in 1966, would be to send a draft copy of each press release to the Program Committee chairman, for verification of factual material. Since, during most of the early planning, major publicity releases do not occur very frequently, this would involve very little effort and no significant delay.

14.   SPECIAL PROBLEMS

Previous sections have mentioned a host of problems that were encountered and
more or less solved during the course of convention planning. There was
another set of problems that were encountered during the convention itself.
For example, it was part of the plan for the 1966 ADI convention to have a good
deal of comment from the floor, in all sessions. To this end, microphones
were placed at several points in the meeting rooms, to permit the audience
to hear questions and comments addressed to the speakers. During the first
session it was discovered that feedback from the loud speakers caused a squeal
in the floor microphones, and it was necessary to either cut them off or move
them to inconvenient locations. In both cases, the result was a drop in
hearable audience participation.

The carryover of sound from one meeting room to the next was mentioned earlier.
One of the problems was to know when this was happening and to take steps
(e.g., cutting amplifier volume) to reduce the interference. Once the problem
was apparent, on the first day of the convention, the Program Chairman, his
secretary, and the audio-visual chairman made it their business to check each
room, early in the session, for such problems. It would have been helpful to
have a person whose only, or at least primary, responsibility was to check
all rooms in which a session was about to begin, or was in progress, for any
sound problems.

There were also problems related to seating. Some of the estimates of
attendance at particular sessions proved to be inaccurate, and several times
there was a requirement for a large number of additional chairs. This problem
was met largely by conscripting any nearby members of the Convention Committee
and having them scurry for chairs. If the hotel were well equipped, this
problem need not arise, since each room could be "oversupplied." This was
not possible in 1966. However, it would have been desirable to have a person
specifically responsible for checking on seating capacity and arranging for
extra chairs. Ideally, the convention hotel should provide both the checkers
and the chair-providers, but it would probably not be wise to place great
dependence on them.

Several times during each day of the convention, general announcements needed
to be made. The ad hoc system used at the 1966 ADI convention was to have
announcements typed out by the Program Chairman or his secretary (see Figure
18 for example) and then handed to the session chairman or chairmen. It would
have been desirable to have established some other mechanism that did not
require the involvement of the Program Chairman. For example, a box could
have been placed at convention headquarters, in which announcements could be
placed by any convention committee member. At periodic intervals, a secretary
who was very familiar with the overall convention schedule would pick up the
requested announcements, "batch" them for the convenience of the session
chairmen, make enough copies for all the sessions at which the announcements
were to be made, and deliver them to the session chairmen. Incidentally,

<u>PANEL CHAIRMEN PLEASE READ</u>

SOME OF YOU HAVE ASKED ABOUT THE PRIZE PAPERS SESSION THIS

AFTERNOON. 3 AUTHORS HAVE BEEN SELECTED TO GIVE PRESENTATIONS,

ON THE BASIS OF THEIR SUBMITTED PAPERS. THEY WILL NOT READ THE

PAPERS THAT YOU HAVE ALREADY READ PERHAPS IN THE PROCEEDINGS.

RATHER, THEY WILL BRING THEM UP TO DATE AND INCLUDE THE

FEEDBACK RECEIVED FROM THEIR AUTHOR FORUMS EARLIER THIS WEEK.

Figure 18. Sample of Announcements Read by Session Chairmen

anel Chairmen should be advised to either read the announcements 5-10 minutes
fter the session is underway or else read them twice, at the very beginning
nd at the end.

uring the convention week, there were a host of other minor but very time-
onsuming problems, such as helping Publicity Committee personnel to identify
ome particular panelist for possible interview by the press. The number and
ind of such problems and demands is undoubtedly unpredictable, but it is an
bsolute certainty that they will exist. During the 1966 convention, the
roblems were handled largely by the Program Chairman and two persons who
erved as a "catastrophe team." The team should probably have been twice as
arge; however, the important thing is that some people be available who are
horoughly reliable, hard workers, and capable of both spotting problems and
sing good judgment in solving them or referring them to appropriate others
or solution. The inability to specify exactly what problems would occur led
s, in 1966, to delay planning of the "catastrophe team" until it was almost
oo late. The 1966 experience suggests that if people can be found who are
illing to help cope with an unspecified number of unspecified problems during
he convention, it is very much worthwhile to have them.

t was the case in 1966 that the Program Chairman, as the person most familiar
ith all the details of the convention program and with the scheduled
articipants, would exercise the day-to-day coordination of the convention.
hoever this coordinator is in 1967, and in later conventions, it is highly
esirable that he be physically present at the hotel throughout the convention
eek. Therefore, he should be assigned one of the complimentary rooms provided
y the hotel, preferably one sufficiently spacious for work as well as recovery.

15.   POST-CONVENTION EVALUATION

This report is one of several that provides a recor? -? experience on ~~
1966 ADI convention. It was apparent long before the convention that some of
that experience represented mistakes and more or less wasted effort. To a
major extent, these stem from the absence of guidelines for ADI convention.
Records of experience are valuable when they are reasonably detailed, but
most of the past ADI convention reports have not provided enough information
for convention committees to do their work in an economical and orderly
fashion.

Shortly before the 1966 convention, the decision was made by the 1966, 1967,
and 1968 committees that there should be an ADI convention manual that would
serve as a "how-to-do-it" guide. It is planned that the first rough draft
of that manual be liberally reviewed by members of all three convention
committees, hopefully early in 1967, and that the planning effort for the
1967 meeting in New York be considered as something of a laboratory for
validating (i.e., testing and revising) the manual.

Another kind of post-convention evaluation is also in progress. A special
convention evaluation form (See Figure 19) was placed in the convention
packet of each registrant, to be filled out and mailed back after the
convention. Analysis of the returns was initiated in December 1966.

Planners of future conventions may wish to give consideration to other
evaluation approaches, such as direct interviewing of attendees. While this
is more time-consuming than mail-in questionnaires, the sampling problems
are no more formidable, and one can anticipate receiving valuable inputs that
may be missed in questionnaire studies.

WILL YOU PLEASE HELP . . .

     the planning for the 1967 ADI Convention

       by spending 5 minutes after the convention to complete this brief form?

1. Are you a member of ADI?   _____

2. How many ADI conventions have you attended previously?   _____

3. How would you rate the overall quality of this convention compared with
    previous ADI (or other) conventions you have attended?

    ___Excellent   ___Very good   ___Good   ___Fair   ___Poor

4. What features did you like best about this convention?

5. What specific things could have been added, deleted, or handled dif-
    ferently to make this convention a better one?

6. What specific topics or events would you like to have included in future
    ADI conventions?

    Figure 19. Questionnaire for Evaluation of 1966 Meeting (Sheet one)

7. The Program Chairman for the 1967 convention, Paul Fasano, is interested
    in learning who might wish to prepare a paper for the 1967 convention and
    who might want to participate by chairing a tutorial or review session,
    user group, discussion group, etc. Please indicate below:

    (a) I would be interested in preparing a paper.   ☐ Yes   ◇ No

    (b) I would be interested in chairing the following type of session:

         (If you have expressed an interest, please be s᾽ ᷤe to sign below.)

THANK YOU for your help!

If you will provide your name and address, we will send you a copy of the
report based on this questionnaire.

                                    _____
                                                    (Name)

                                    _____

                                    _____
                                                   (Address)

Please mail this form to:

                         Miss Ann C. Walker
                         Convention Evaluation Committee
                         16531 Sunset Boulevard, Apt. 3
                         Pacific Palisades, California   90272

    Figure 19. Questionnaire for Evaluation of 1966 Meeting (Sheet two)

16.   RECOMMENDATIONS

In each of the preceding sections, recommendations have been made (or implied)
for the improvement of future convention planning activities. In this section,
several additional recommendations are offered. These reflect some of the
personal experiences of the 1966 Program Chairman and, necessarily, some of
the special conditions related to the convention site and the convention
committee.

1.   Begin the program planning with a small, lean crew, in order to maximize
      communication and mutual understanding. Add others primarily as the
      need arises. (However, don't delay so long that the newcomers cannot
      become aware of the overall convention concept and of the rationale
      for existing plans.)

2.   Use the small initial staff to study past convention schedules and
      critiques and to lay out a gross plan and schedule of activities.
      It is important that the initial planning avoid details or matters
      that do not need to be considered until months later. Such matters
      may be noted in a schedule of "things to worry about," but they should
      not be permitted to displace effort on major issues.

3.   Circulate the initial convention concept (consisting both of a rough
      calendar and a statement of underlying rationale) to selected ADI
      members who have been associated with past conventions or are known
      to be interested in professional communication. Request comments and
      suggestions, and be sure to include a hoped-for response date, to
      avoid having to seemingly ignore too-late comments.

4.   Anticipate the possibility that one or two major program elements may
      need to be accommodated after the initial plan is "approved." (The
      SLA session and the STWP session at the 1966 meeting are good cases in
      point.) Perhaps leave a blank 1-2 hour time slot available temporarily,
      as insurance against a desirable but program-disrupting addition.

5.   Make sure that the hotel that is selected has adequate space, has
      handled major conventions, and has a convention manager who is experien:ed
      and disposed to be helpful. Meet the primary contact person at the
      hotel personally and maintain periodic contact to establish the working-
      together relationship you will need in the critical last months of
      planning and in the convention week.

6.   Insist that the person who will be responsible for room space and audio-
      visual support understand he is to work closely with the program
      chairman. This is one area in which the tail should definitely not be
      permitted to wag the dog.

.n setting up the mechanism for handling contributed papers, think
hrough the anticipated flow and lay out as "automated" a system as
ossible. Plan the form-letter acknowledgments, acceptance letters,
ejection letters, rating forms, etc., in such a way that with appropriate
ecretarial help the system can "run itself."

ecognize the fact that planning and operating the technical program
re going to require much more time than you can possible imagine at
he outset, even with good plans and good people. Try to conserve some
f your time by having your secretary learn everything possible about
onvention plans and procedures. She will not only be able to function
s a strong assistant by convention time; she will also be able to
eflect or handle the problems represented by the average 2-3 phone
alls a day that for one reason or another the program chairman begins
eceiving during the month or two before the convention.

se some of the initial assignments to committee personnel as a means
f calibrating their ability, their motivation, and their
ependability. When due dates on assignments are missed, do not expect
he problem to improve later. If others are depending on this person's
ollowing through on assignments, it will be necessary to risk his
ersonal displeasure and move him to a less sensitive position. (Not
aving enough time to work actively on a convention is certainly no
rime, but accepting a key role and defaulting on it is.)

ive very careful consideration to the means by which (1) convention
xperience is recorded and (2) updates are provided to the forthcoming
DI convention guide. No one can remember everything of importance that
akes place during a two-year planning effort; on the other hand, most
ersons are likely to be delinquent in keeping a detailed diary of their
ctivities. Perhaps the most important kind of transfer of experience
s personal and verbal. Whatever the decision, all committee members
hould understand and abide by it, and the convention chairman (or
is designee) should continually satisfy himself that this is the case.
n other words, the convention committee and the ADI should make every
ffort to insure that the valuable professional time of convention
ommittee personnel is not wasted by having to repeat, ad infinitum,
he learning processes and errors of all their predecessors.

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Ira, Carlos A.

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ımprehensive report on the experiences of the Program Committee
the 29th Annual Meeting of the American Documentation Institute, held
ianta Monica, California, from October 3-7, 1966. The report describes
program planning and program support activities in detail; provides
ıles of the materials, forms and schedules used; highlights problems
successes; and makes a number of detailed and general recommendations
streamlining future ADI convention planning.

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